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20 JAN 1972

NOTES FOR: Chief, Benefits and Services Division

SUBJECT : 1971-72 Consolidated Fund Drive

After six months of involvement with the Consolidated Fund Drive, there are some observations and suggestions that I would like to share, with a view to contributing, hopefully, to the running of next year's campaign.

SETTING OF CFC GOALS FOR THE AGENCY

Many problems were encountered due to offices' providing the Fund Drive Coordinator with an incorrect number for on-duty strength. This led to the setting of office goals that in some cases were unfairly high -- and protests from the offices concerned. Setting of a single goal for the Agency (in consultation with the Civil Service Commission) would eliminate this. It might also eliminate a sense of inter-office competition that perhaps is needed in order to encourage offices to contribute. Nevertheless, I felt that an undue amount of attention was paid to "meeting the goal," in my opinion detracting from the concept of charity. It was obvious that the major concern in some cases was that one's office not "lose face" with senior officials of the Agency.

CONTRIBUTOR CARDS

This year additional information was required by the Payroll Office on payroll deduction cards, due to a new computerized payroll system. The cards were to show the following information:

1. name of contributor as shown on payroll records
2. full (6-digit) employee serial number
3. directorate and office of contributor
4. month and day of birth of contributor
5. type of funds (vouchered or confidential) by which contributor is paid
6. contributor's signature
7. correct allotment per pay period to correspond with total gift.

Regardless of several written reminders issued by the undersigned, numerous incomplete cards were received in the Fund Drive

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Office, which necessitated calls to the campaign workers or contributors concerned. It was felt that many employees resented giving this information. In addition, this requirement occasioned a memorandum from DDP/Publications, requesting that the Fund Drive Office stamp "SECRET" on all cards containing the above information.

It is my opinion that a pre-punched computer card, marked "SECRET," issued by the Office of Finance and containing all necessary information except the type and amount of contribution and signature, would eliminate error, aggravation and wasted labor. Such a card was proposed by the 1970-71 Fund Drive Coordinator, [REDACTED] but the proposal was not adopted.

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RESPONSIBILITIES OF OFFICE CHAIRMEN AND KEYMEN

During the 1971-72 Fund Drive it was found that 1) some Office Chairmen and Keymen did not read and comply with instructions as stated in the 7-page memorandum provided them; and 2) portions of the instructions should be changed or clarified. Attached, therefore to these notes is a proposed modified set of instructions (Attachment I). In addition, I believe that "live" training sessions, strongly urged by the Fund Drive Office and by the Office Chairmen, would be beneficial (and perhaps less formidable than the lengthy set of written instructions). At this time Keymen could be prepared for some of the opposition to a charities drive that they are apt to meet. Mr. Bannon at CFC headquarters could be contacted prior to the session, to provide information, for example, on operating costs and on procedures for allotting designated funds. Accountability for numbered cards and envelopes should be stressed to campaign workers, who in turn should verbally instruct employees of the necessity of turning them in, or in their place, a memo stating their loss or destruction.

PROCEDURES FOR PROCESSING CONTRIBUTIONS

This year the Fund Drive Office modified the procedures being used in past years to process contributions, mainly in the interest of reducing the number of people handling money, and of eliminating duplication of labor. The staff of the Fund Drive Office this year numbered nine, including the coordinator, her assistant and the book-keeper. Attached is an outline of the procedures followed (Attachment II). (Please read before continuing.)

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1 I would suggest requesting only two additional detailees from the TAS in the future (or 8 persons). They would be best utilized as checkers and sorters, as there were at times too many cards and report envelopes for one clerk to handle. (this occasional hindrance; however, did not affect up-to-date campaign books, since the posting preceded the checking and sorting.)

2 I would also suggest that this year's procedure for sorting cards be changed: Instead of separating the two portions of the cards and distributing the cards into 5 categories after checking them, it would be helpful to keep the numbered portion attached to the original and to file the cards, intact, according to number (which would also mean according to office). This would provide for easy referral to the cards, in case the need for a check arose. At the end of the campaign (while the detailees from the TAS are still assigned to the office), the cards could be separated and filed (the numbered portions according to number and the originals according to type of contribution.) The main difficulty that arose in connection with filing cards this year was that in several cases the wrong office was entered on cards by contributors; therefore when they reached the Fund Drive Office the original portions of some payroll deduction cards, which were to be filed according to office, were placed in the wrong section, and at the end of the campaign, when we attempted to balance payroll deduction cards for each office with our books, we encountered difficulty. If the cards were to remain intact until the end of the campaign, the payroll deduction cards would be located in their proper section, by virtue of their numbers (the packet issue book lists the numbers assigned to each office, and serves as a control.)

PAYROLL DEDUCTIONS

This year several employees requested that their payroll deduction pledges be paid off in fewer than 13 or 26 pay periods, by authorizing a larger deduction per pay period. We were advised by the Payroll Office that their system did not allow for this. If their computers could be programmed in such a way as to provide for a cessation of deductions when an employee's pledge is fulfilled, this would work to the advantage of CFC, by accomodating persons who simply do not wish to contribute by cash, but who wish to have their deductions stopped automatically on a given date. (Under the present

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system, an employee must send a memo to the Fund Drive Coordinator when he wishes his deductions to culminate before the end of the year.)

3 Each year there are write-offs on payroll deduction pledges of persons who resign or retire before the end of the year. Perhaps in order to lessen the amount of unpaid pledges, a separating employee could be asked by the Office of Finance representative during exit processing, if he wishes to have the remainder of his pledge paid off from his lump sum leave payment. He could authorize this in writing, and Payroll office could forward the amounts to FDC as part of its monthly payments.

CERTIFICATES OF ACHIEVEMENT

4 During the course of this year's campaign it was suggested that campaign workers might be given greater recognition by the personal awarding of certificates by someone in a position of authority, such as a division chief or office chief. This suggestion is valid when one considers how much time a conscientious chairman or keyman must devote to contacting employees, collecting contributions, checking cards, making reports and turn-ins. This year the certificates were handcarried to the members of the Consolidated Charities Committee by the Fund Drive Coordinator, with the suggestion that they determine a method for awarding certificates, which would be fitting.

BOOKKEEPING SYSTEM

It is hoped that upon her return from a TDY, the Finance officer who was assigned to the Fund Drive Office this year, and who initiated a new method of bookkeeping for Consolidated Charities, will provide a report and explanation of this system, as a third attachment to these notes.



Fund Drive Coordinator

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